

# CH9 – Contract extension (no change in project or objective of work)

In circumstances where an employee has a fixed term contract that needs to be extended, their appointment will need to be amended, the cost allocations updated; and if relevant, allowances may also have to be extended. For further guidance please contact Personnel Services.

**What's changed?**  
Screenshots replaced following the implementation of Self-Service.  
**September 18**

Any changes to allowances will need to be approved within the system. Approvers should refer to **QRG: FD5\_Approve (or Reject) Salary/ Allowances**.

If the employee has a work visa the terms must be checked before any changes are made to their appointment. Contact the Staff immigration team for guidance.

 **Note:** Where there is also a change in the project or objective of the work, **QRG: CH16\_Manage Changes with Staff Request** must be followed instead of this guide and a new contract issued.

This guide covers the following process steps:

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## 1. Amend Appointment

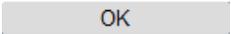
**Navigate to: Personnel > Maintenance > Personal profile**

1. Search for the employee record and go to Select Detail box > Appointment Details. The *Appointment Details* window opens.
2. If relevant, click into the **Appointment ID** to ensure the correct appointment is highlighted. Click the **Amend Appointment** button. The Amend Appointment Details window opens:

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3. Amend details as required.

Field Name (* mandatory)	Description
<b>Effective Date *</b>	If the contract extension effective date is in the past then use that date. Otherwise make the contract extension effective today (not a future date)  <b>Note:</b> If you have any issues entering this due to other future dated appointments already recorded contact HRIS Support.
<b>Target End Date *</b>	Update with new end date of the extended contract.
<b>Action *</b>	From the LoV  select <b>Contract Extended</b>
<b>Reason Code *</b>	From the LoV  select one of the following reason codes as applicable: <ul style="list-style-type: none"> <li>Additional Work Required</li> <li>New External Funding (New Source)</li> <li>New External Funding (Same Source)</li> </ul>
<b>Comments *</b>	Enter any relevant comments.

4. Click . The *Amend Appointment Details* window closes.

5. A message confirms that changes have been made. Click .

## 2. Update Cost Allocations



In this scenario funding is not normally going to change but the end date of the funding may need to be updated to match the new contract target end date. If the funding *is* changing then the current cost allocation must be ended and a new allocation added from the appropriate start date.



**Note: You must not delete the current cost allocations or edit them other than to enter an end date. .**

Whether or not the funding is changing:

1. Go to **Selection > Cost Allocation** – The *Cost Allocation* window opens.
2. To add/update the end date to the current allocation, click **Edit** next to the relevant line.

The *Add/Edit Cost Allocation* window opens:

%	Cost Centre	Description	Project Code	Description	
100	ZW000000000000	INSTITUTE OF FUTURE TECHNOLOGIES			Delete
					Delete

### 2.1. If the funding is not changing

Enter the revised **End Date** and click **Save** then **OK**. You are returned to the *Cost Allocations* window.

### 2.2. If the funding is changing

- 2.2.1. Enter the End Date and click **Save** then **OK**. You are returned to the *Cost Allocations* window.

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**Note:** The **End Date** must be the day before the new allocation is to start with no gaps.

2.2.2. Complete details as below.

Field Name (* mandatory)	Description
<b>Start Date *</b>	Enter the start date for the new cost allocation. (This should be the same date as the effective date of the appointment change.)
<b>End Date *</b>	Enter the end date for the new cost allocation if applicable.
<b>% *</b>	Enter %, e.g. 100, 50. <b>Note:</b> allocation may be split between more than one Cost Centre, but the total allocation must add up to 100%, even where the FTE is less than 1.
<b>Cost Centre *</b>	<i>(For each line entered)</i> If the salary is being paid from a project, select or enter 'CCPROJ'. If the salary is being paid from a GL cost centre, select/enter the relevant GL code in the format AA999999999 where AA is the 2 digit department code. <i>See row 1 in the example below.</i>
<b>Project Code *</b>	<i>(For each line entered)</i> If you have already entered a GL code, leave this field blank. If the salary is being paid from a project, select the relevant Project Code in the format AAXXXXXX.0000 where AA is the 2 digit department code. Take care to check the correct code has been selected. <i>See row 2 in the example below.</i>
<b>Expense</b>	Do not use

**Notes:**

- You can type the cost centre straight in, but it must be in upper case.
- Always use the search function when entering a project code(s)
- When searching, the name/description is displayed in the first column in the search results; scroll right to view the codes.

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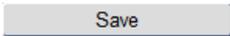


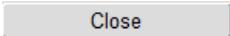
**NB:** When you add a Project code and click on ok the screen jumps to an 'Expense' field . This field is not being used. Use the scroll bar at the bottom of the screen to view the cost allocations you have recorded.

## Examples

- If you have entered a GL code in the cost allocation screen it should look like row **1**.
- If you have entered a project code in the cost allocation screen, it should look like row **2**.

%	Cost Centre	Description	Project Code	Description	
50	AA0000000000	AA0000000000 Example GL code			Delete
50	CCPROJ	CCPROJ Cost Allocated to a Project	ABCDEF00.0000	ABCDEF00.AB00.01 Example description	Delete
					Delete

2.2.3. Click  then . You are returned to the Cost Allocations window.

2.2.4. Click . You are returned to the Post Appointment Maintenance window. Click .



If the employee has allowances they may also need to be extended. Where the allowance already has an end date, a new allowance must be added to align with the extension.

## 3. View and Amend Allowances (if relevant)

1. To view the employee's allowances go to **Selection > View Position History**. The *View Position History* window opens:

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- Switch to the **Allowance Details** tab to show the detail of the allowances:

Status	Allowance	Allowance Type	Scale Point/ Percentage	Value	Annual Value	Start Date	End Date	Reason
Approved	Misc Non Pens Payment	Variable Value		100.00	1200.00	14-JUL-2015	13-JUL-2016	ALLOWANCE AWARDED

- Exit back to the *Post Appointment Maintenance* window.
- Go to **Selection > Amend Pay Rate**.

- To add a new allowance set the **Effective Date [A]** to the date the new allowance is to be paid from.
- Click the checkbox **Allowances Only [B]**.
- Click the **Add Allowance** button **[C]**. The *Add Allowance* window opens:

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8. Complete the **Allowance Details** screen as below:

Field Name (* mandatory)	Description
<b>Allowance *</b>	Select the relevant value from the list. The Allowance Type field will populate with a description of the type of allowance e.g. variable value.
<b>Start Date *</b>	Check the start date has been entered correctly
<b>End Date *</b> 	Enter the end date to align with the contract extension. <b>Note:</b> If the end date is left blank, payment will be paid continually.
Dependent upon the type of allowance selected you now need to enter either the Scale point, Percentage or Value as described below:	
<b>Scale Point ■</b>	If relevant, select Scale point, this will relate to a rate table.
<b>Percentage ■</b>	If relevant, enter % to be applied.
<b>Value ■</b> 	If relevant, enter the value of the allowance, e.g., 200 for a £200 per month allowance. Press tab - the system will automatically calculate the annualised value. <b>Note:</b> Most allowances are paid in full, i.e. the amount entered will not be prorated to take account of FTE, ensure value entered takes account of FTE and salary multiplier.
<b>Cost Centre *</b> 	If the salary is being paid from a project, select or enter 'CCPROJ'.  If the salary is being paid from a GL cost centre, select/enter the relevant GL code in the format AA999999999 where AA is the 2 digit department code. See row 1 in the example below.

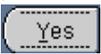
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<b>Project *</b> 	<p>If you have already entered a GL code, leave this field blank.</p> <p>If the salary is being paid from a project, select the relevant Project Code in the format AAXXXXXX.0000 where AA is the 2 digit department code. Take care to check the correct code has been selected. <i>See row 2 in the example below.</i></p>
<b>Expense</b>	Leave blank - this field is not used by the University.
<b>Reason *</b>	Select the relevant reason code, e.g. <b>Allowance Awarded.</b>
<b>Comments*</b>	Enter comments as applicable e.g. Contract extended and the reason entered on the Appointment change.
<b>Reference</b>	No longer in use. References entered previously will still be displayed.

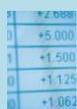
### Notes:



- You can type the cost centre straight in, but it must be in upper case.
- Always use the search function when entering a project code(s)
- When searching, the name/description is displayed in the first column in the search results; scroll right to view the codes.

9. Click . The *Add Allowances* window closes.
10. Click . The system will ask if you are sure you want to add this salary amendment, or may alert you that this will close the existing allowance, click .
11. The *Maintain HR Salary Amendments* window opens.
12. If you have Salary Approval access and it is appropriate to do so you can approve the salary and/or allowance change straight away. Exit all windows back to the Personnel main screen.

**NEXT STEPS:** Unless at 12 above you were able to approve the allowance, the allowance will now appear in your approver's list for approval. Approvers should refer to **ORG: FD5 Approve (or Reject) Salary/ Allowances** for guidance on approving. A letter to confirm the changes should also be generated and sent to the individual. A template is available in Tools> Letters: *Fixed Term Contract Extended*.



+	5,000
+	1,500
0	+1,125
0	+1,062

### Useful Reports

To help track fixed term contract dates don't forget to regularly run: [PERDEP02 FTC End Dates](#) report.